Apps4.Pro Planner Manager - Archive Plans User Manual

The **Archive Plan** is the Pro feature of Apps4Pro Planner Manager. The Planner Manager extension is a web-based Chrome Extension application that can be installed and used on any operating systems (Windows, Mac, Linux) with Chrome browser (also works in Edge preview build). The app uses our other service Wunder365 as a back-end service to safely save your plan details to the SharePoint list under the plan's associated Office 365 group.

After successfully archive a plan, you can view the archived plan and task details in read-only mode from this app, once you have confirmed the required plan details are archived successfully, you can delete the archived plan from Planner.

Note: The archived plan details are stored under the plan's associated Office 365 group, so you should not delete the plan's associated group at any cost. You will lose the archived plan details if you have deleted the group.

The archive plan process saves the following plan and task details.

- Task Title
- User Assignments
- Applied Labels
- Bucket
- Progress
- Start and Due dates
- Description
- Checklists
- Attachments (URLs alone – Files will be available in the plan's associated SharePoint site)
- Comments (Conversation ID alone – Comments will be available in the plan's associated Group mailbox)
- Plan – All Buckets
- Plan – All Labels
- Plan Members - We are using the plan's associated Office 365 group, so the members will be automatically available in the group.
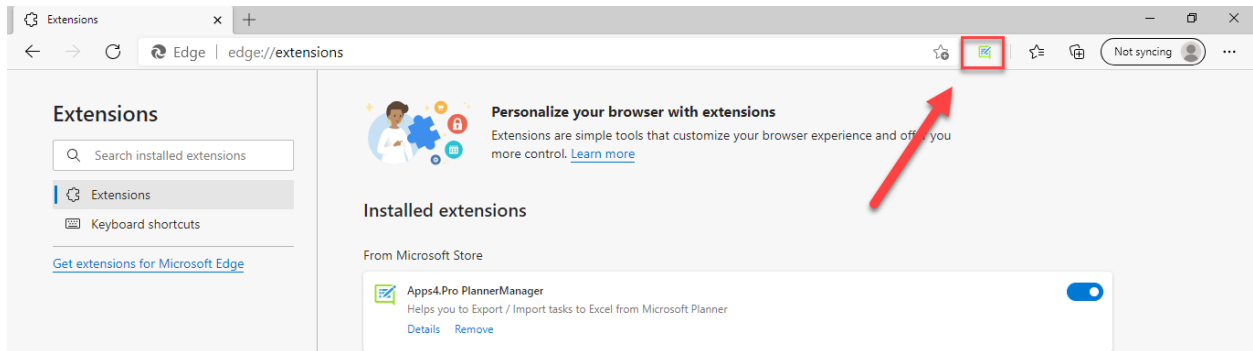
How to install

You can install this add-in from Chrome Web Store using below link:

https://microsoftedge.microsoft.com/addons/detail/apps4pro-plannermanager/dikkemgbicnfdghhdpaahkdkgbddphmn

As already mentioned, the tool uses the Wunder365 as a back-end service, you need to install Wunder365 Manager chrome extension to get started and sign in with your Office 365 Account. If not installed or not signed in, the archive process will prompt you to install and sign-in to the tool.

How to access

Once you have installed this extension from Edge Web Store, you can access the add-in by clicking the app short-cut icon from the top-right corner of your Edge browser as shown in the below image.
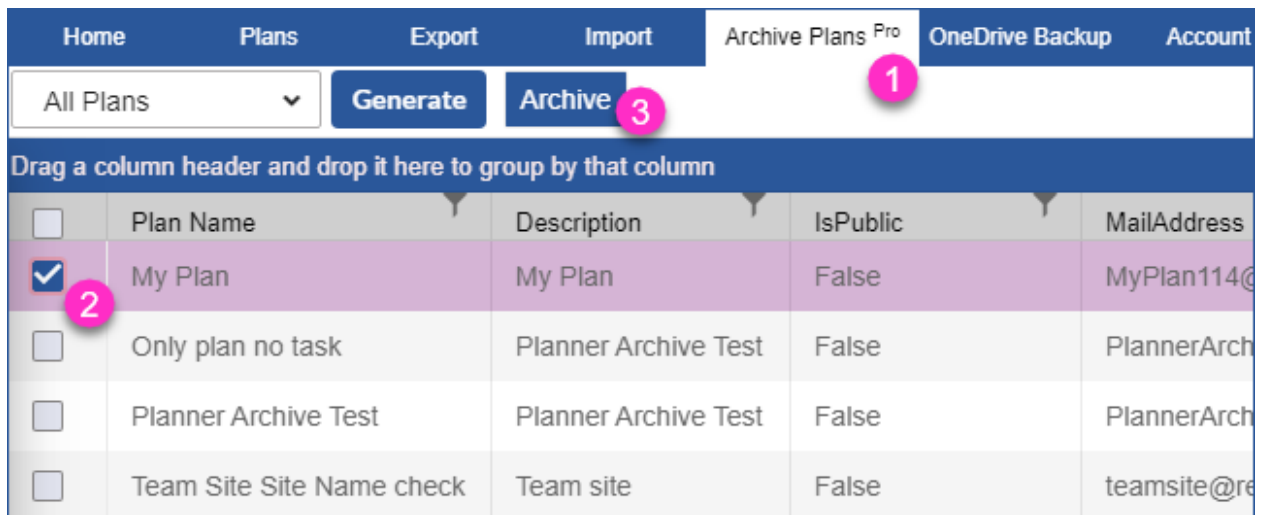

Permissions required

No special permissions required. As per current Planner design only Plan members can able to read planner data and only Plan owners can able to write data in the plan's associated group, so the account which you are going to use with this tool should be an owner and member of the plans those you want to archive.
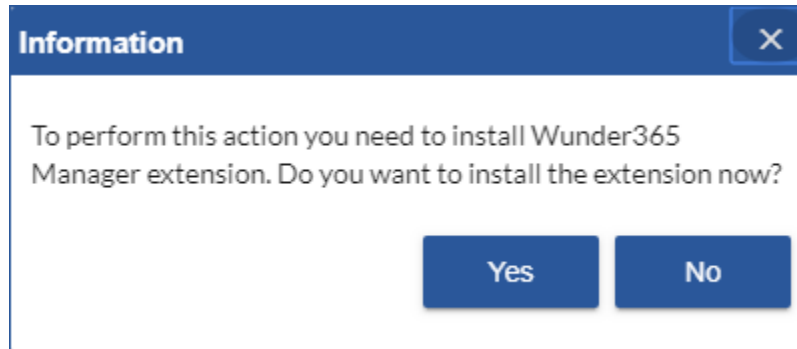
Steps to Archive Plan

1. Open Planner Manager chrome extension -> click on Archive Plans tab -> Generate All plans.
2. After generating all plans, select a plan and click on Archive button to archive the plan.
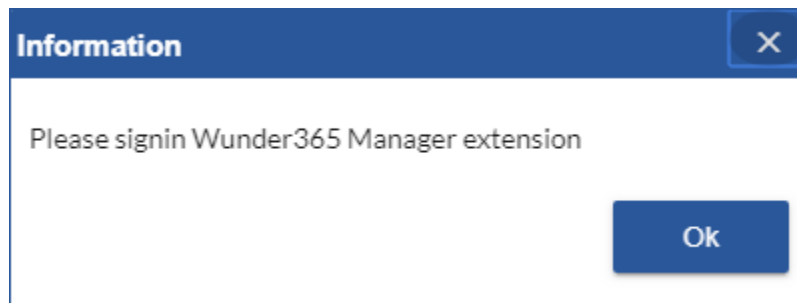

3. After clicking the Archive button, you will be prompted to install and sign-in to Wunder365 Manager tool. If the W365 Manager chrome extension already installed and signed in, then skip the following steps from 4-6 and go to step 7 directly.
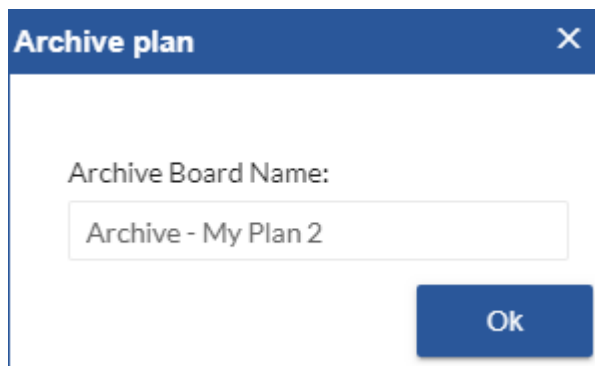
4. If Wunder365 Manager is not installed, the pop-up will show up to install Wunder365 Manager. Click on 'Yes' to install the tool. This will take you to the Chrome web store to install the chrome extension. Install it on the browser.

Information   ✕

To perform this action you need to install Wunder365
Manager extension. Do you want to install the extension now?
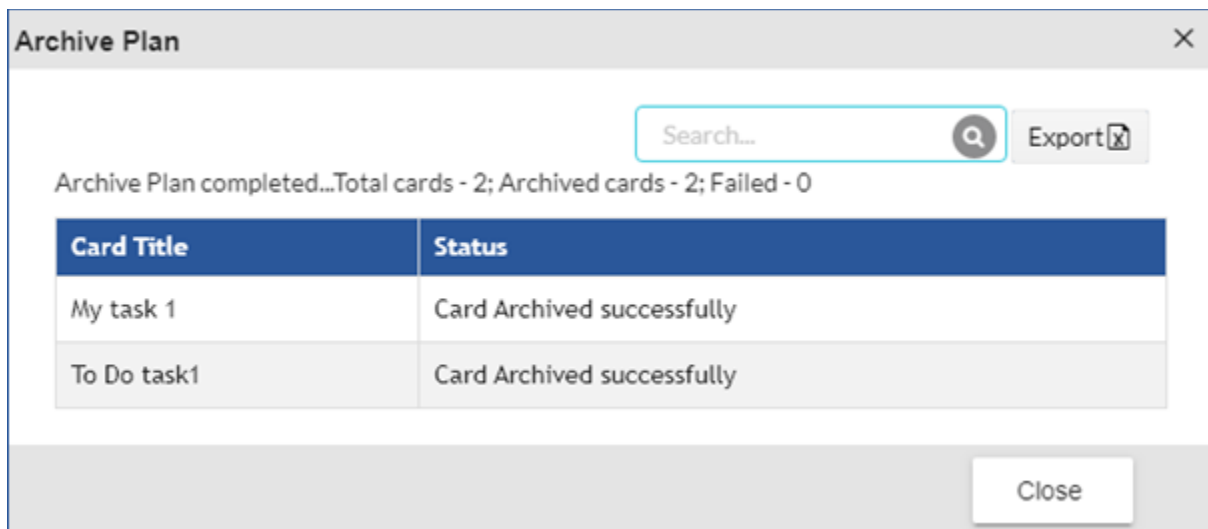
[Yes]   [No]

5. After installing successfully, select the plan, if not selected and click on the Archive button again. This pop-up will show to sign into Wunder365 Manager. Click OK to sign in and complete the sign-in process under Account Tab.

Information   ✕

Please signin Wunder365 Manager extension

[Ok]

6. Archived plans are treated as archived boards, you can enter the required board name for the plan you are going to archive and click **Ok**.

Archive plan   ✕
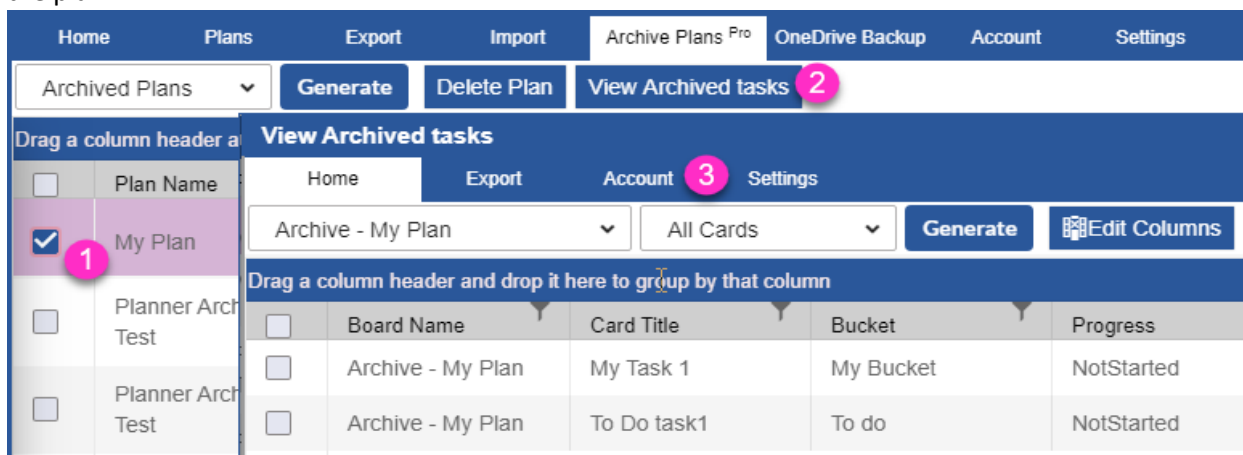
Archive Board Name:

Archive - My Plan 2

[Ok]

7. Once the Archive plan process started, the results will be shown up. Once completed, click on Close (X) button to the close the Action Results dialog box.

View Archived Plans and Tasks

1. In report picker, select Archived Plans and click **Generate** to list the archived plans.
2. Select any one of the archived plan and click on **View Archived tasks** to view archived tasks in the plan.

3. Once you confirmed the required tasks are archived successfully, if needed, you can delete the plan from Planner. As already mentioned, the archived plan details are stored under the plan's associated Office 365 group, so you should not delete the plan's associated group at any cost. You will lose the archived details if you have deleted the group.